How to create a task

A task is your on-screen ‘post it’, a visual reminder of those important jobs that must be completed within a specific time frame.

When you log in to Mediadisk 2006, details of any tasks that are due on the current date will be immediately displayed on your screen.

You will find that tasks are a reliable and useful tool to help you organise your daily schedule.

To create a task, complete the following instructions:

1. Choose one of the following methods to display the **Create Task** window (Figure 1):

   - Select **Create Task** from the **Relationships** menu.
   - Select **Create New Task** in the **Relationship** page of the Quick Launch Bar.
   - To create a task and link it to an activity in a project, with your project displayed in the **Manage Projects** window, click the **Planning** tab. In the resulting **Planning** page, click to highlight the relevant activity, and then click the **Create Task** button.
   - In the **Daily Briefing** page, double-click the relevant date in the calendar.
   - In the **Calendar** window, double-click the relevant date, or time if the calendar is displayed in *Day* view.
   - To create a task and link it to a relationship, in the **Create Relationship** window, once the relationship has been saved, click the **Create Task** button.

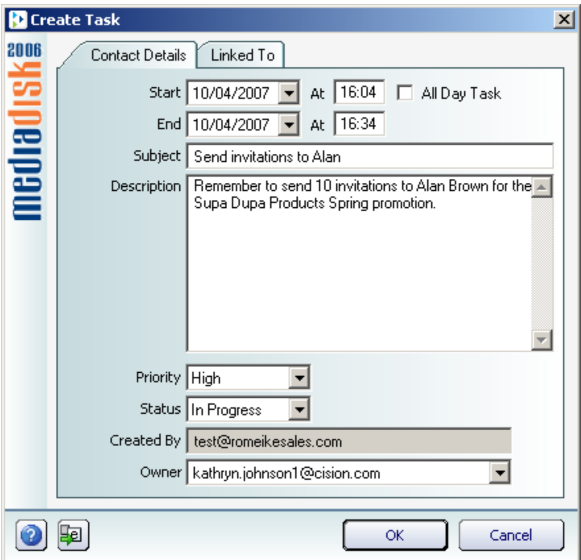

Figure 1

2. Complete the following:

Start

This is the date and time that the task should commence, and is a mandatory entry. This defaults to the current date (the exception to this is when you are creating the task via the **Calendar**, in which case the start date will be the day that you have selected). If you wish to change the date, type the new date in dd/mm/yyyy format, or click the accompanying arrow button to use a calendar. If there is no specific time for the task to commence, select the **All Day Task** check box. If you do not select **All Day Task**, the time lapse between the **Start** and **End** times will default to 30 minutes, commencing at the current time. The exception to this is when you are creating the task via the Calendar window, in which case the time will commence at 00:00 hrs for the *Week* and *Month* view, and the time slot that you have clicked in the *Day* view (e.g. 08.30). If you wish to change the time, delete the numbers in the **At** input box and type the start time in hh:mm format (if you have not selected the **All Day Task** check box, you must enter this information).

End

This is the date and time that the task should finish, and is a mandatory entry. As with the **Start** time, this defaults to the current date (with the exceptions described in **Start** above) but can be amended (see above). If you have not selected the **All Day Task** check box described above, you must enter an end time (see **Start** above for details of time entry).

Subject

This is the subject of the task and is a mandatory entry.

> **Tip** - if you want to add special language-based characters that are not available on your keyboard, click at the bottom of the window to display the **Character Map** window.

Description

Enter the details of the task here.

Priority

This is the priority of the task, which defaults to *Normal*. To change this, click the accompanying arrow button and make your selection from the resulting list (i.e. *High*, or *Low*).

Status

This is the status of the task, which defaults to *Planning*. To change this, click the accompanying arrow button and make your selection from the resulting list (i.e. *In Progress*, or *Completed*).

Created by

This is the email address of the user who is logged in at the time of creating the task. This information is read-only.

Owner

This is the user name of the person to whom the task is allocated. This defaults to the creator's email address but can be changed. To do this, click the accompanying arrow button and select the appropriate entry from the resulting list.

3. Complete the following in the **Linked To** page (Figure 2). Depending on the method that you have used to access the **Task** window, some of this information may already be completed. For example, if you are creating a task via the **Planning** page of your project, **Client**, **Project**, **Entity Type**, and **Entity Description** will be completed (in this case, the **Entity Type** would be the activity to which the task was linked, and the **Entity Description** would be the **Description** of the activity).

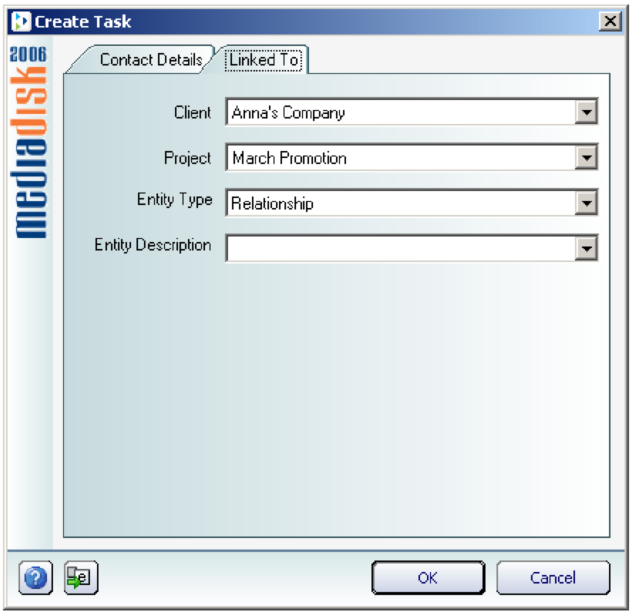

Figure 2

Client

This is the client with whom the task is associated. Linking a task to a client will enable you to search for all tasks that are related to that client. Select from the accompanying drop-down list. If you do not wish to select a specific client, select the name of your company instead.

Project

This is the project with which the task is associated. If you have selected a client, projects associated with that client will be displayed in the accompanying drop-down list. If not, <u>all</u> projects will be displayed.

Entity Type

This indicates with which entity the task is associated (i.e. *Activity*, *Distribution*, *Relationship*, *Media Opportunity*). Select from the accompanying drop-down list. You do not have to select an entity type, a task can also be standalone and act purely as a general reminder of a job that you need to complete; when that is the case, select the blank line in the list. If you have created the task via the **Create Relationship** window, this will automatically be completed with *'Relationship'*

Entity Description

This is the name of the entity, if you have selected one (e.g. the distribution name, relationship name, media opportunity description, activity name). Select from the accompanying drop-down list. If you have created the task via the **Create Relationship** window, the name of the relationship will already be displayed. If you have selected a specific client and no project, then the list will comprise the names of any entities of the type that you have selected that are also linked to that client. If you have selected a client and project, then the names of any entities of the type that you have selected and that are linked to that project will be displayed. Otherwise, the names of all entities of the type that you have selected will be displayed.

4. Click the **OK** button to save the task. An email will be sent to the owner of the task containing full details. If you have linked your task to a media opportunity or relationship, a **View** button will be displayed in the **Linked To** page which you can click to display full details of the event or relationship respectively.

Please note - once you have saved a task, you cannot amend any of the information in the **Linked To** page.